TL22 Business Process Definition – Position Bid Process – Schedule Upload

All Union Bid processes are currently done manually. This process will remain manual.

Employees baseline schedule will be changed by the TAAD by one of the following methods:
• Schedule Upload - template spreadsheet upload
• Schedule Assignment – template spreadsheet for Position Bid

TL22A – Schedule Upload

Position Bids for ATU and BPOA Officers will be uploaded using the "Schedule Upload" process. This will require a spreadsheet to provide the time schedule for each impacted employee. The Position Bid results will be provided in an Excel spreadsheet (saved as a comma delimited file, .CSV). The spreadsheet contains:
• Job No
    • The Job No can be up to 10 characters.
    • All Job No's for the Communication Specialist & Power Support Bids will start with O.
    • All Job No's for the Foreworker Position Bids will start with F.
    • All Job No's for the Station Agent Position Bids will start with S.
    • All Job No's for the Train Operator Position Bids will start with T.
    • All Job No's for the Transportation Clerks Position Bid will start with C.
• EmplID
    • The EmplID field is 6 characters that are zero filled. For example, the Employee No 12345 would be passed as EmplID 012345.
    • If a position is filled, then employee's ID will be passed.
    • If a position is vacant, the EmplID will be 999Xnn where:
        • X is the same character as used for the start of the Job No, e.g. F, S or T.
        • nn is a number from 00 through 99.
        • Vacant employees for Communication Specialist & Power Support Bids will be 999O00, 999O01, 999O02, etc.
        • Vacant employees for Foreworker Bids will be 999F00, 999F01, 999F02, etc.
        • Vacant employees for Station Agent Bids will be 999S00, 999S01, 999S02, etc.
        • Vacant employees for Train Operator Bids will be 999T00, 999T01, 999T02, etc.
        • Vacant employees for Transportation Clerk Bids will be 999C00, 999C01, 999C02, etc.
    • The vacant position EmplID's are to be loaded. The convention of having a character in the Employee ID for these vacant employee placeholders is to avoid conflict when the actual employee id range eventually reaches the 999000 series.
• Department
• Day 1 Start Time – End Time
• Day 1 Location
• Day 2 Start Time – End Time
• Day 2 Location
• Day 3 Start Time – End Time
• Day 3 Location
• Day 4 Start Time – End Time
• Day 4 Location
• Day 5 Start Time – End Time)
• Day 5 Location
• Day 6 Start Time – End Time
• Day 6 Location
• Day 7 Start Time – End Time
• Day 7 Location
    • 7 days Start Time – End Time:

- Enter shift start/end time (e.g. 0800-1700) and off days (OFF) for a 1 week period. The week should be for Monday – Sunday.
  - If a shift contains Primary Station Agent premium, then the shift start/end time will end with "P" (e.g. 0800-1600P).
  - If a shift contains Crew Office premium, then the shift start/end time will end with "C" (e.g. 0800-1600C).
- 7 days Location:
  - Location is required for a day that is not identified as an OFF day.
  - The Location must match one of the predefined TCD's that have been identified as the primary Schedule Location. This is controlled by the TCD Group with the naming convention SCHEDLOCN.
  - BRTL_SCHEDULE_LOCN Query can be used to review the valid Locations accepted by the Schedule Upload interface.
- Shift – 1 (Day), 2 (Swing), 3 (Graveyard). Used for Approve Time breakdown of Cost Center.
- Extra board – The extra board field will be populated with:
  - AMX for AM extra board
  - PMX for PM extra board.
  - Left Blank – not an extra board.
- Extra board – The extra board field will be populated with:

The spreadsheet document will be emailed to TAAD to upload into PeopleSoft. The email will need to specify the Start Date and End Date for loading the schedule, and whether the schedule is a Full Load (system bid) or Partial Load (line bid). The Start Date should always be a Monday date.

The schedule upload process, which is run by TAAD, will load the 7-day shifts into the Schedule Override table. The Maintain Time Reporter table will also be affected when:
- The Shift data is different to what already exists in Rule Element 3. This will insert a new row with the Rule Element 3 field populated.
- Extra Board field is populated with AMX or PMX. This will insert a new row with the Rule Element 4 field populated.
- If Extra Board field is left blank, and the existing Maintain Time Reporter previously had the time reporter identified as AMX or PMX, then a new row with the Rule Element 4 field being cleared will be created.

Process Steps - TL22A – Schedule Upload

Step	Process	Responsibility
1.	The manual Position Bid is processed and employees are assigned to scheduled jobs. The bid is finalized and posted.	Management / Union Stewards / Employee

Step	Process	Responsibility
2.	The Scheduling Manager takes the finalized Position Bid and formats it into the Time and Labor Schedule Upload template spreadsheet. The spreadsheet is sent to TAAD (for schedule changes) and HRIS (for Department, Location changes). The email must identify: • Start Date (must be a Monday Date) • End Date (must be a Sunday Date) • Full Load (All Jobs) or Partial Load (some Jobs). Schedule Uploads should allow for 5 business days (Monday through Friday) for schedules and departments to be changed.	Scheduling Manager
3.	TAAD receives an email containing the Schedule Upload spreadsheet (template provided) containing the BID results.	TAAD
4.	E-mail confirmation is sent to the Scheduling Manager upon receipt of the document.	TAAD
5.	TAAD will run the Schedule Upload process and verify the process has completed successfully.	TAAD
6.	Notify TAAD and Scheduling Manager when Department, Location and Reports To information have been updated.	HRIS
7.	The Scheduling Manager will receive notification via e-mail verifying the new bid schedule information has been set up in PeopleSoft Time & Labor. The BRTL_SCHEDULE_UPLOAD Query results will be attached in the email	TAAD
8.	The Upload Results spreadsheet is reviewed by the Scheduling Manager.	Scheduling Manager
9.	TAAD should be contacted if there are inaccuracies in the new schedule data. HRIS should be contacted if there are inaccuracies in the new Department, Job Location data.	Department / TAAD / HRIS